



ClickPoint Software
Simplified Lead Management & Automated Marketing

CLICKPOINT WHITE PAPER

The Story of Mobile-Enabled Lead Management: High Conversion Rates of a B2C Field Service Company

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Authors note

Despite operating on their own, the working lives of field sales agents for companies providing services to residential customers are a shared experience. For many, there is more than a hint of frustration at the process of working without access to the resources available in an office, and wondering if perhaps there isn't a better way.

One such person with this shared experience is my best friend and he explained his problem to me. This is the story of how our automated lead management solution, mobile-enabled and optimized for life on the road helps to keep his company successful while enabling him to grow his business.

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Scottsdale, Arizona
April 2015



True Story...

Field salespeople often live life on the road, quickly moving from one project to the next. Anyone in field sales understands how your car or truck becomes your second home. If you are anything like my best friend, you have everything you would ever need in your vehicle. He travels to each of his job sites to check in on his installation teams and then he is on to the next sales opportunity.

My friend spends about three hours of actual time per week in his brick and mortar office and the rest of the time in his office on wheels. Running one of the best companies in the Southern Virginia area for residential Heating, Ventilation & Air Conditioning (HVAC), my friend quickly found himself with a problem that is not unique in the field sales industry: He was great at closing business himself but it was time to expand.

He knew which leads worked and he knew how to close deals with precision and care. What he lacked was a unified system to ensure his salespeople were following all the same steps that he would take when attempting to close each new sale; ensuring every single lead he purchased was handled with urgency and care.

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Lightbulb: Automated lead management

Lead management software brings leads together from inbound marketing channels such as inquiries made through website forms, email requests and call centers. Automated lead management processing provides a single view across all lead generation channels.

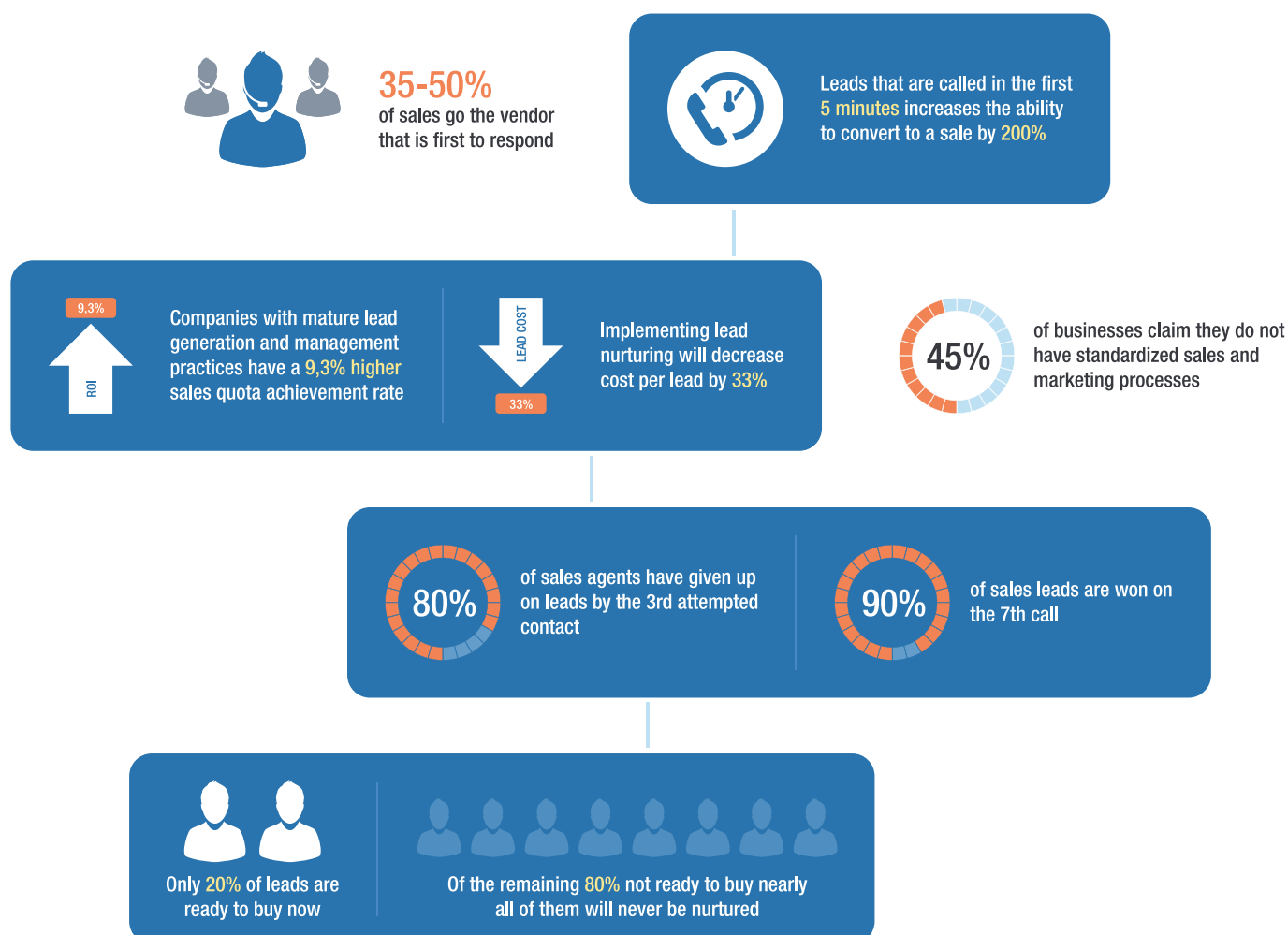
Now it's in a single system; uniform lead scoring criteria is applied enabling accurate routing to the most appropriate field sales, call center agents or salespeople in your external ecosystem.

This happens in real-time, transforming the ability to analyze the data, understand trends and optimize your operations and processes.

An automated lead management solution transforms sales operations, compared to companies using manual lead management processes, based on spreadsheets. Call rates may double, and response times of 2 - 3 minutes let a company exploit the advantages of following up on a lead by phone within 5 minutes.

Despite compelling conversion statistics, many find lead management software that works for office based salespeople is just not right for field-based sales, and my friend was no exception.

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Understanding what is really needed

Most accept the idea that mobile solutions improve the lives of salespeople on the go. But how many solutions actually give you what you need without all the stuff you don't? Often you don't need the same layout, menus and windows as you would see on a laptop or desktop PC. You don't need to configure and perform detailed administration. You just need access to the information and features that let field sales operate effectively.

And we need to remember that we interact with mobile devices differently; small touch screens can be frustrating if you are trying to use apps and websites not optimized for mobile with responsive design.

The best approach seems to be to ask yourself what you really need. In the case of my friend, it was the need to ensure leads from Home Advisor and his landing page www.cleanairvb.com, went to the right salesperson in real-time. It was essential for him to see the progress each salesperson was making on each lead. Did his team need his help on a deal? If so, he needed to see this in real-time so he could respond and give each team member the support they required.

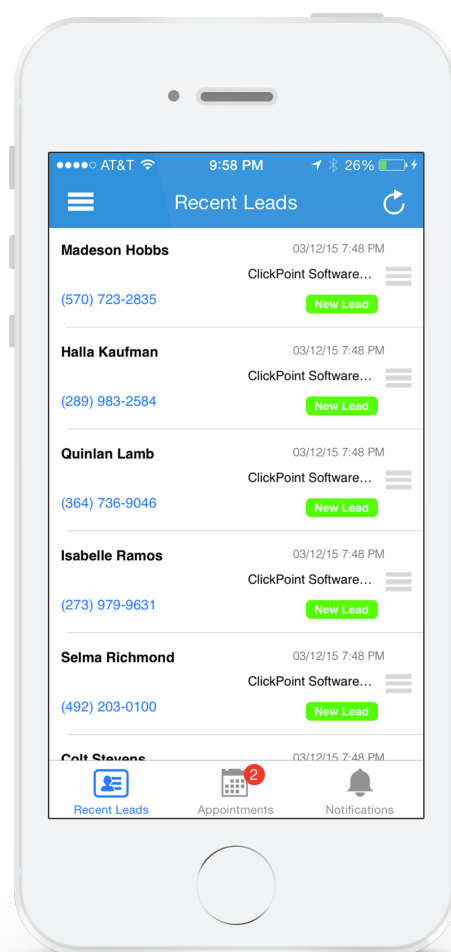
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Empowering field sales with mobile-enabled lead management

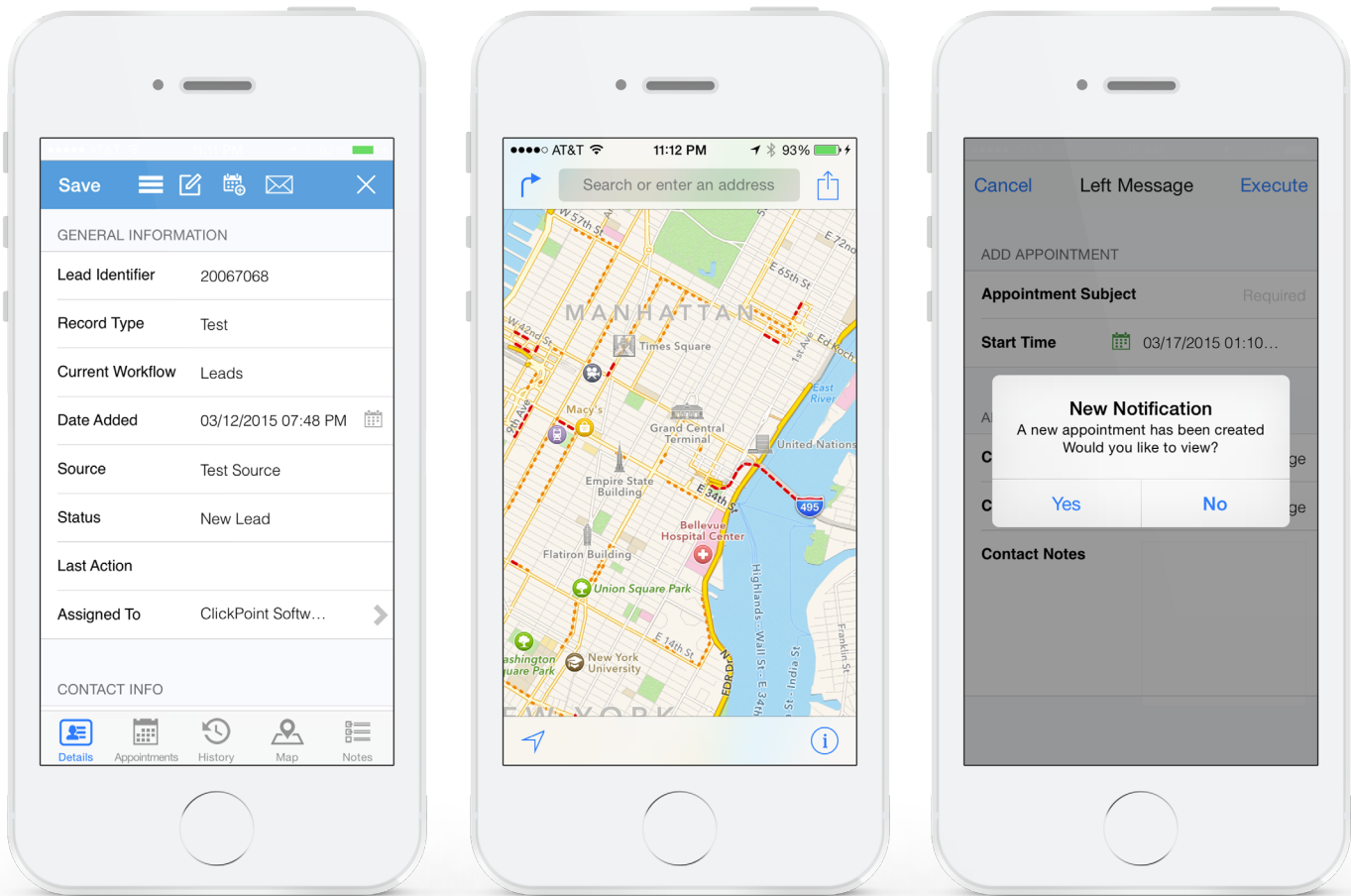
A superior lead management solution uses mobile enablement features to maximize the ability of mobile field service companies to respond rapidly to sales inquiries. Inbound sales inquiries are prioritized according to lead scores and matched to the most appropriate agent, something that may be determined as areas of expertise, sales skills or geographical proximity.

A step by step process of how the solution empowers field sales agents to respond efficiently to customer requests is:

1. Inbound lead inquiry to call center or from website, email or other channel enters SalesExec
2. ZIP code analysis, skill, priority, round-robin, or pull is used to identify closest or most appropriate field sales agent
3. Lead sent to field sales agent's Apple iPhone and a push notification pops up on the agents phone
4. Clicking lead on iPhone allows agent to respond by calling or emailing immediately
5. Address supported by turn-by-turn instructions to direct agent to prospect



My friend was able to quickly assess sales agents that needed help making more calls or needed more leads. Some of his agents were working the leads and needed more, while others were overwhelmed and needed more hand holding. By monitoring all this from his iPad he was able to give his team the help they needed to make the most of the solution and thereby close more business in less time.



Moral of the story: Call quickly and be patient

One thing my friend explained to me was the reason he had over 300 positive reviews on Home Advisor. He was so effective the CEO called him personally to find out why he was so successful. The 'secret' was simply the fact that he called each lead the moment he received it. We all know the research statistics, but if you don't, here they are:

- Calling back within 5 minutes increases conversion rates 200%
- 35-50% of sales go to the vendor that calls back first

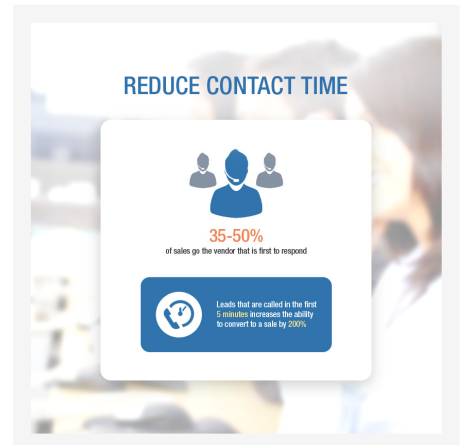
More importantly, your sales representatives need to call a lead more than once or twice. Does your current solution enable this type of activity or does it inhibit this type of calling? There is a reason Hybrid Air is the top HVAC company in Southern Virginia and it all has to do with calling leads and optimizing marketing. It's nice to think there must be some magic formula, but there isn't. It's hard work supported with a simple mobile lead management solution that helps ensure calls are made every time new leads come in. Using sales best practices helps ensure your sales teams maximize opportunities:

- 80% of salespeople give up by the third contact attempt
- 90% of sales are converted on the 7th call

If you spend money on leads or marketing, but don't ensure the basic actions suggested by the statistics are carried out, it is my assertion that you are failing to achieve your true potential:

- Don't neglect leads - call leads fast
- Be persistent but patient - call more than once or twice

Having a mobile solution that is optimized for field sales helps you do this and manages the process so that it can be repeated. This enables you to scale your business while ensuring customers receive your best attention and consistently high levels of service – the things that make my friend – and other top performing field service companies - successful in the first place.



Why ClickPoint?

High conversion rates for field service companies with ClickPoint

ClickPoint Software offers automated Lead Distribution, Marketing Automation, and Lead Management solutions for leads acquired across multiple channels.

For field service companies responding to inbound inquiries from multiple channels, ClickPoint mobile enablement optimizes lead management to put the essential information your people in the field need to be more productive and effective.

Our solutions provide value, helping our customers to generate more ROI from marketing by:

- Enabling sales teams to close more leads in less time
- Maximizing lead value by capturing, routing, and scoring leads

Call us today

Call us today on 1 (866) 372-9431 or come visit

www.clickpointsoftware.com to find out more about how we are able to help you.